**Webinar Series: Evaluating and Sharing Your Library's Impact**

**Learner Guide**

<https://www.webjunction.org/news/webjunction/webinar-series-research-assessment.html>

**Series Description**: Ensure your library’s programs and services are meeting patrons’ needs and exceeding expectations by using evaluation techniques that demonstrate results. This three-part webinar series on user-centered assessment and evaluation will help you go from gut instinct to data-supported proof.

Bringing together research and practice from across library sectors, the series will cover the ins and outs of creating assessments that provide useful, actionable data. From figuring out what information you need for an effective assessment to applying your findings, the webinars will feature experts who will teach you to evaluate your programs and services in a way that empowers you to meet the unique and evolving needs of your patrons and make the case for how your library plays a critical role in your community.

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| **What are your goals for participating in this series?** | |
| **Personal Goals** |  |
| **Team Goals** |  |
| [**Part 1: User-centered Assessment: Leveraging What You Know and Filling in the Gaps**](https://www.webjunction.org/events/webjunction/user-centered-assessment.html) Whether you’re trying to decide how to allocate your library’s resources or make the best use of your space, formal assessment tools can guide your decision-making. This session will cover why formal assessments are more effective than anecdotal data, and help you plan effective evaluations. You will learn how to use what you already know about your patrons, how to determine what information you still need, and how to formulate questions to get you there. | |
| **Reflections on Informal Assessment** | |
| Consider or discuss examples of recent decisions your library has made related to policies, services, collections or programs that were based on informal assessment, arising from anecdotes or casual observation. Did you feel there was enough information to get staff on board? To identify and clarify changes with library users and potential users? To get buy-in from stakeholders? If you had data available to support your decisions, would you have felt more equipped to clarify the changes? | |
| **Exploring Existing Data** | |
| There are many existing data sources that can help inform your assessment process. Review ***Existing Data Sources*** at the end of the guide and explore those relevant to your community and assessment needs and note those that provide access to relevant raw data. Depending upon your assessment plan, you may find it useful to dig into these data to provide context, benchmarking, and more.  Also consider the relevant data your library is already collecting: | |
| **User Focus in Community Context** | |
| Libraries often launch assessment within the context of the library’s services, programs and collections. User-focused assessment begins with the right questions about your users or potential users.   1. Based on the data you know and the considerations about what is working/not working for your users, what more do you want or need to know about your current or potential users? 2. What can you learn ONLY from your users? 3. What information is missing, and what will you need to know to answer these questions? 4. How do you narrow down and focus on the data to use? How do you select those data that are measurable? And analyzable? | |
| **Reflection on Intended Outcomes** | |
| Use this short exercise to consider the intended user-focused outcome:  Because the library provides \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, the  (service, collection, program)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is able to do  (user groups/s)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  (outcome)  How might this outcome be measured/evaluated? | |
| **Common Data Needs** | |
| Invite colleagues, locally or regionally, to join a discussion to learn more about their data needs.   * What needs do you have in common? * What data collections or published results have your libraries found helpful in the past? * What data are the most important? * What data are missing? | |
| **Getting to the Right Research Questions** | |
| In order to formulate questions to better meet user, potential users, and community needs/expectations, consider what you want to know about one or all of these groups. Consider user attitudes, opinions, beliefs, behaviors, actions, demographics.   * Users * Potential Users * Community * Other stakeholders in the institution or community   Now begin to articulate the primary problem or challenge you are seeking to understand and address. How can you frame your questions in order to investigate and support possible solutions?  What additional information and data do you think you will need? Note, it could be informed by the data you’ve already collected and never thought to use, because you weren’t asking this specific question! And you don’t have to define *how* you collect that information at this time.  After completing the above exercise, you have drafted your research questions! With these questions, you’ll be prepared to explore research methods in the next webinar. | |
| **Take Action** | |
| Use the time between webinars to take action with your learning. Include a few next steps and identify who will take which steps and by when. | |
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| [**Part 2: Digging into Assessment Data: Tips, Tricks, and Tools of the Trade**](https://www.webjunction.org/events/webjunction/digging-into-assessment-data.html) You know what you want to know and how to ask the right questions. Now what? This session will delve into assessment tools and data collection methods—and how to choose the method that works best for your questions. You also will learn how to analyze your data and turn it into information your library can use. Don’t worry if using qualitative and quantitative data is new to you. You’ll gain the insight you need to use both with confidence. | |

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| **Assessment tools/data collection methods** |
| Has your library used any of the following methods for assessment purposes? If so, consider the benefits or drawbacks of each. Each method is linked to information on Wikipedia and see also, ***Data Collection Method Resources*** at the end of this learner guide.   * [Surveys](https://en.wikipedia.org/wiki/Survey_methodology) * [Individual Interviews](https://en.wikipedia.org/wiki/Interview_(research)) * [Focus Group Interviews](https://en.wikipedia.org/wiki/Focus_group) * [Structured Observations](https://en.wikipedia.org/wiki/Observational_methods_in_psychology#Structured_Observation) * [Ethnographic Research](https://en.wikipedia.org/wiki/Ethnography#Features_of_ethnographic_research) (e.g. [mappings](https://en.wikipedia.org/wiki/Information_mapping), [diaries](https://en.wikipedia.org/wiki/Diary_studies), participant/immersive observations) * [Analytics](https://en.wikipedia.org/wiki/Analytics) * [Experimental Design](https://en.wikipedia.org/wiki/Research_design#Experimental_research_designs) (with control groups) * [Usability Testing](https://en.wikipedia.org/wiki/Usability_testing) * Other |
| **Determine the methods** |
| Considering your research question(s), identify the methods best suited to collect the data needed for your research and identify potential advantages and disadvantages of each. Remember that certain methods will allow you to *focus on the research question and the purpose of your research*.  1.  2.  3.  4. |

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| **Data Analysis** |
| Based on your research questions and selected data collection methods, make a plan for your quantitative and/or qualitative data analysis.  What kind of analysis will you do? (e.g. open coding, applying an existing coding scheme, calculating means/medians, ranked list of options)  Keep in mind that some analyses will require more time and deeper knowledge of data analysis tools. For instance, some methods require coding of collected data. For additional information on coding, creating a codebook, etc., see ***Data Collection Methods and Analysis Resources*** below.  It’s also important to be realistic in estimating the time it will take to analyze the data. If you have a deadline for presenting your findings, budget accordingly. |
| **Making Sense of the Findings** |
| Now that you’ve analyzed your user data, what should you do with it?  Take the data that maps to your research questions and interpret how they specifically relate to your unique setting. Make sense of it based on your internal knowledge about your organization and community. For example:   * If the data tell you that users have a higher demand for space to study during the hours of 19:00-close, is this likely because the campus coffee shop closes at 19:00? If so, extend the hours of the library café and coffee shop. * If seniors are interested in participating in activities with their grandchildren, develop programs for them to attend together. * If faculty and students use WhatsApp or other messaging systems for keeping up with current news and events, send information about events and sources that may be of interest to them via WhatsApp or other messaging systems.   Remember, you may see other information in the data that doesn’t map to your research question/s, but it still could be valuable to your efforts. It may surface a question you hadn’t considered. |
| **Take Action** |
| Use this time between webinars to take action with your learning. Include a few next steps and identify who will take which steps and by when. |
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| [**Part 3: Take Action: Using and Presenting Research Findings to Make Your Case**](https://www.webjunction.org/events/webjunction/presenting-research-findings.html) You’ve formulated the hard question/s. You’ve collected your data. What stories do your findings tell, and what do they suggest? This final session explores how to present findings to your library’s key stakeholders and decision-makers in a compelling way, and how to turn those findings into action that benefits your patrons. |
| **Developing Strategic Initiatives** |
| Now that you have user-center data to inform your decisions, develop strategic initiatives and action plans to meet your users’ needs. Check the boxes below for all the areas that could be impacted by changes made, using your meaningful research findings. Circle the areas to prioritize for your planning.   * instruction or program * reference * educational role * space, physical * discovery: institutional web, resource guides * collections * personnel * scholarly communications * other: |

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| **Stakeholder Priorities** |
| List three of your library’s stakeholders and identify some of their top priorities. Based on these priorities, what measures do you think would be most meaningful to them? Stakeholders could be users, potential users, staff, the public, a board member, management, etc.  Stakeholder 1:  Priority:  Meaningful data:  Stakeholder 2:  Priority:  Meaningful data:  Stakeholder 3:  Priority:  Meaningful data: |

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| **Making the Case and Telling the Story** |
| Now for each of these stakeholders, use the meaningful data to make the case and tell the story for your approach to new or improved responses to user needs. (Consider using the [27-9-3 method](http://www.powerprism.org/27-9-3-elevator-pitch.htm) to create a persuasive “pitch” statement that can be presented using no more than 27 words, within a time frame no longer than nine seconds, and discussing no more than three points.)  Stakeholder 1:  Stakeholder 2:  Stakeholder 3: |
| **Other Ways of Telling the Story** |
| Explore other ways to package your findings for different constituencies to promote new initiatives, changes made, etc. (reports, press releases, openings/events, visualizations, infographics, etc.) Review some of the examples in the resources list below and identify some of the ways you would like to present your library story. |

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| **Action Plan:** (include next steps, who, when, etc.) |
| Remember, assessment is cyclical! What are the gaps in the data collected and analyzed? What will you do if you need to make a stronger case? |

**Resources Section**

**Existing Data Sources**

* IFLA’s [Library](https://librarymap.ifla.org/) Map of the World

**Public Libraries**

* [Pew Research Center](http://www.pewresearch.org/topics/libraries/)
* [OCLC Reports](https://www.oclc.org/research/publications/reports.html)
  + [From Awareness to Funding: Voter Perceptions and Support of Public Libraries in 2018](https://www.oclc.org/research/publications/2018/oclcresearch-awareness-to-funding/report.html)
    - Raw data available
  + [The Many Faces of Digital Visitors and Residents: Facets of Online Engagement](https://www.oclc.org/content/research/publications/2017/oclcresearch-many-faces-digital-vandr.html)
  + [Advancing the National Digital Platform: The State of Digitization in US Public and State Libraries](https://www.oclc.org/content/research/publications/2017/oclcresearch-advancing-national-digital-platform.html)
* [2014 Digital Inclusion & Public Libraries](https://digitalinclusion.umd.edu/content/2014-survey-results-and-reports)
* [2015 Public Libraries Survey](https://www.imls.gov/research-evaluation/data-collection/public-libraries-survey/explore-pls-data/pls-data)
  + Raw data available
* [2017 Public Library Data Service Report](http://publiclibrariesonline.org/2017/12/the-2017-public-library-data-service-report-characteristics-and-trends/)
  + Raw data available
  + Note: FY 2018 PLS data will be released in Spring 2020. The FY 2019 PLDS survey has been cancelled as of February 2020, in favor of a new data collection system being developed which will replace the PLDS.
* [State of America’s Libraries 2019](http://www.ala.org/news/state-americas-libraries-report-2019/public-libraries) (2020 report due mid-April 2020)

**Academic Libraries**

* [OCLC Reports](https://www.oclc.org/research/publications/reports.html)
  + [The Many Faces of Digital Visitors and Residents: Facets of Online Engagement](https://www.oclc.org/content/research/publications/2017/oclcresearch-many-faces-digital-vandr.html)
* [Visualizing Academic Library Impact: The ACRL/OCLC Literature Analysis Dashboard](http://experimental.worldcat.org/valresearch)
* [The Value of Academic Libraries: A Comprehensive Research Review and Report](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/val_report.pdf) (ACRL) and [blog](http://www.acrl.ala.org/value/)
* [Academic Library Impact: Improving Practice and Essential Areas to Research](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/publications/whitepapers/academiclib.pdf) (ACRL)
* [Assessment in Action: Academic Libraries and Student Success](http://www.ala.org/acrl/AiA) (ACRL)
* National Center for Education Statistics [Academic Libraries Survey (ALS) data](https://nces.ed.gov/ipeds/use-the-data)
* [NCES Library Statistics program](https://nces.ed.gov/surveys/libraries/academic.asp)
* [Linking the Strategic with the Micro: A Survey of the Assessment Landscape in Academic Libraries](https://www.slideshare.net/mccarthymadsen/linking-the-strategic-with-the-micro-a-survey-of-the-assessment-landscape-in-academic-libraries) (2017)
  + Presentation by Christine Madsen and Megan Hurst
* [ACRL Academic Library Trends and Statistics Annual Survey](https://crln.acrl.org/index.php/crlnews/article/view/24280/32091) (Subscription to *ACRLMetrics* is required or current report purchased from ALA Store)
* [Academic Library Impact on Student Learning and Success: Findings from Assessment in Action Team Projects](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/issues/value/findings_y3.pdf) (ACRL)
* [State of America’s Libraries 2019](http://www.ala.org/news/state-americas-libraries-report-2019/academic-libraries) (2020 report due mid-April 2020)

**Research Libraries**

* [Association of Research Libraries (ARL) Data & Analytics](http://www.arl.org/focus-areas/statistics-assessment#.WsVum38h2pp)
* [Ithaka S+R US Library Survey 2016](http://www.sr.ithaka.org/publications/us-library-survey-2016/)
  + Datasets housed in [ICPSR](https://www.icpsr.umich.edu/icpsrweb/ICPSR/series/226)
* [Canada: CARL ABRC annual statistics](http://www.carl-abrc.ca/measuring-impact/statistics/)
* [Australia and New Zealand: CAUL annual statistics](https://www.caul.edu.au/services-programs/statistics-services)
* [UK: Office for National Statistics](https://www.ons.gov.uk/)

**Data Collection Methods and Analysis Resources**

**Assessment and Evaluation**

* [*Count Your Impact: Getting Started with Outcome-Based Evaluation*](http://cslinsession.cvlsites.org/past/count-your-impact-getting-started-with-outcome-based-evaluation/) (2016)
  + Colorado State Library webinar with Linda Hofschire
* [Evaluating Digital Services: A *Visitors and Residents* Approach](https://www.jisc.ac.uk/guides/evaluating-digital-services)
  + A guide contains advice on evaluating the services you offer to your users. The focus is primarily on digital/online services but set within the broader context of more traditional services, exploring the relationship between the two.
* [*Measures that Matter Part Two: Detailing the Data-based Story of Public Libraries*](https://www.webjunction.org/events/webjunction/measures-that-matter-2.html)(2017)
  + WebJunction and COSLA webinar, exploring concepts of sampling, data types, and data management, and how they impact what we know about public libraries and their patrons.
* [Understanding Sampling](http://toolkit.pellinstitute.org/evaluation-guide/collect-data/understand-sampling/), Evaluation Toolkit from the *Pell Institute*
* [Assessing Community Needs and Resources](https://ctb.ku.edu/en/assessing-community-needs-and-resources) from *Community Tool Box*
  + Working Group for Community Health and Development at the University of Kansas, 2016.
  + Extensive resource of surveys, tools, and techniques for conducting interviews, focus groups, and surveys of all types.
* [*User-centered Assessment: Leveraging What You Know and Filling the Gaps*](https://www.webjunction.org/events/webjunction/user-centered-assessment.html) (2018)
  + WebJunction webinar with Kara Reuter and Lynn Silipigni Connaway
* [Planning & Evaluation](http://www.ala.org/pla/resources/tools/directors-managers-administrators/planning-evaluation) Professional Tools from *Public Library Association* (PLA)
* [Library Assessment Conference 2018 Proceedings](https://www.libraryassessment.org/past-conferences/2018-library-assessment-conference/2018-proceedings/)
* ACRL 2019 Proceedings
  + [Creating an Outreach Story: Assessment Results, Strategic Planning, and Reflection](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/confsandpreconfs/2019/CreatinganOutreachStory.pdf) by Amy Wainwright and Rosan Mitola
  + [“I’d Say It’s Good Progress”: An Ecological Momentary Assessment of Student Research Habits](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/confsandpreconfs/2019/IdSayItsGoodProgress.pdf) by Emily Crist, Sean Leahy, and Alan Carbery
  + [Recasting the 21st Century Community College Library: Transforming the Student Experience through Space Planning and Assessment](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/confsandpreconfs/2019/Recastingthe21stCenturyCommunityCollegeLibrary.pdf) by Jennifer Arnold

**Books/Resource Lists**

* [*Research Methods in Library and Information Science*](http://www.worldcat.org/oclc/992455231) (2017) by Lynn Silipigni Connaway and Marie L. Radford
  + This book provides an overview of developing questions; collecting and analyzing data, with explanations for quantitative, qualitative, and mixed method approaches; and disseminating the findings, i.e., writing reports, papers, grants, etc. Written for practicing professionals, students, and junior faculty.
* [*Sampling: Design and Analysis*](http://www.worldcat.org/oclc/433453665) (2010) a book by Sharon Lohr
* *Seeking Synchronicity: Evaluating Virtual Reference Service from User, Non-user, and Librarian Perspectives: IMLS Final Performance Report:* [*Appendices*](https://www.oclc.org/content/dam/research/activities/synchronicity/reports/20080626-final-appendices.pdf) (pdf)
  + Online survey instruments, focus group interview guidelines and questions, recruitment documents for participants of focus group interviews, consent forms for focus group interviews, etc.
* [Public Library Research](http://www.ala.org/tools/research/larks/publiclibraryresearch) from *Librarian and Researcher Knowledge Space* (LARKS)
  + Links and resources for researchers focused on public libraries - covering the gamut from visits, circulation, internet access and use.
* [Library Assessment: Assessment Tools and Resources from The City University of New York (CUNY)](https://guides.cuny.edu/library_assessment/assessment_tools_and_resources)
  + Libguide of aggregated information about library assessment activities and best practices.
  + Surveys
  + Focus Groups
  + Usability
  + Observation
  + Transaction Logs
  + Interviews
  + Instruction Assessment
  + Web Analytics
* [Library Assessment Tools](https://scrlc.libguides.com/assessment) from South Central Regional Library Council (SCRLC)
  + LibGuide with Empire State Library Network Library Practical Library Assessment Webinar Series.

**Interviews**

* *Digital Visitors and Residents* Semi-structured Interview Questions for [Emerging, Establishing, and Embedding Participants (Secondary/High school and University Levels)](https://www.oclc.org/content/dam/research/activities/vandr/resources/semistructured-for-emg-est-emb.pdf) (pdf) and for [Experiencing Participants (Scholars/Life-long Learners)](https://www.oclc.org/content/dam/research/activities/vandr/resources/semistructured-for-exp.pdf) (pdf)

**Focus Group Interviews**

* [**Designing and Conducting Focus Group Interviews**](http://www.eiu.edu/~ihec/Krueger-FocusGroupInterviews.pdf) (2002) by Richard A. Krueger
  + This guide includes consideration of moderator skills, participant selection and management, question tips and types, analysis and reporting.
* [**Introduction to Conducting Focus Groups**](https://coast.noaa.gov/data/digitalcoast/pdf/focus-groups.pdf)(2015, 2009) by NOAA Coastal Services Center
  + A brief introduction to the steps for conducting focus groups; a high-level view of the process from preparation to analysis.

**Diaries**

* [Diarist Follow-up Interview Questions](https://www.oclc.org/content/dam/research/activities/vandr/resources/diarist-follup-for-all.pdf) for Emerging, Establishing, Embedding, and Experiencing Participants (pdf)
* *Technology and Learning Project* Diary Form: [Questions for Diary Form Submissions](https://www.oclc.org/content/dam/research/activities/vandr/resources/vandr-questions-for-diarists.pdf) (pdf)

**Surveys**

* [*Getting Feedback with Patron Surveys: West Custer County Library*](https://www.webjunction.org/news/webjunction/west-custer-patron-survey.html) (2016)
  + WebJunction interview with Amy Moulton, on conducting a patron survey.
* [*Library Surveys for Success*](https://www.webjunction.org/events/webjunction/library-surveys-for-success.html)(2014)
  + WebJunction webinar presented by Colleen Eggett.
* *Methods 101* video series, [Random Sampling](http://www.pewresearch.org/2017/05/12/video-explainer-understanding-random-sampling-for-public-opinion-surveys/) and [Survey Question Wording](http://www.pewresearch.org/fact-tank/2018/03/21/how-do-you-write-survey-questions-that-accurately-measure-public-opinion/), by Pew Research Center
* *Visitors and Residents* [Online Survey Pretest Questionnaire](https://www.oclc.org/content/dam/research/activities/vandr/resources/vandr-online-survey-google-form.pdf) (pdf)

**Codebooks**

* [Codebook for *Digital Visitors and Residents* Semi-Structured Interviews, Follow-up Interviews, and Diaries](https://www.oclc.org/content/dam/research/activities/vandr/resources/vandr-interview-diary-codebook.pdf) (pdf)
* [Codebook for *Digital Visitors and Residents* Online Survey](https://www.oclc.org/content/dam/research/activities/vandr/resources/vandr-online-survey-codebook.pdf) (pdf)

**Methods and Examples for Presenting Meaningful Data**

* [Visualizing Academic Library Impact: The ACRL/OCLC Literature Analysis Dashboard](http://experimental.worldcat.org/valresearch)
* [Data Visualization for the Rest of Us: A Beginner's Guide](https://www.webjunction.org/events/webjunction/data-visualization-for-the-rest-of-us.html) (2015)
  + WebJunction webinar with Linda Hofschire
* [Data that Jumps Off the Page](https://www.webjunction.org/documents/webjunction/data-that-jumps-off-the-page.html) (2012)
  + Try this exercise to sharpen your recognition of effective data visualization.
* [Interpreting Data for Big Impact](https://www.webjunction.org/news/webjunction/Interpret_Data_for_Impact.html) (2013)
  + A webinar recap of a webinar presenting the research from the Pew Research Center’s Internet & American Life Project
* [Pew Internet: Advocacy Tools for Librarians](https://www.webjunction.org/news/webjunction/Pew-Internet-tools-for-librarians.html) (2014)
  + The Pew Research Center’s Internet & American Life Project produced a series of reports presenting research on library services, trends in reading habits and patron needs in the digital age. The foundation developed advocacy toolkits that include materials librarians can customize and use in their own communities.
* [Data Visualization Guides and Tools](https://www.lib.ncsu.edu/visualization/data-visualization-guides-and-tools) from North Carolina State University (NCSU)

**Other Assessment-Related Resources**

* [ACRL Standards for Proficiencies for Assessment Librarians and Coordinators](http://www.ala.org/acrl/sites/ala.org.acrl/files/content/standards/assessment_proficiencies_draft.pdf) (pdf)
  + Draft version
* [ACRL Proficiencies for Assessment Librarians and Coordinators](http://www.ala.org/acrl/standards/assessment_proficiencies)
* [Data Culture Project](https://databasic.io/en/culture/)
  + A hands-on learning program designed to help organizations build capacity to work with data and to build a “data culture.” An initiative of DataBasic.io.
* [Project Outcome: Measuring the True Impact of Libraries for Academic Libraries](https://acrl.projectoutcome.org/) (ACRL)
  + Resources and Tools to Create Surveys and Analyze Outcome Data
* [Project Outcome: Measuring the True Impact of Libraries for Public Libraries](https://www.projectoutcome.org/) (PLA)
  + Resources and Tools to Create Surveys and Analyze Outcome Data